

Utah!
Where ideas connect

The Message

In each round of messaging research, respondents have consistently identified three key emotional benefits from leisure and recreational activities:

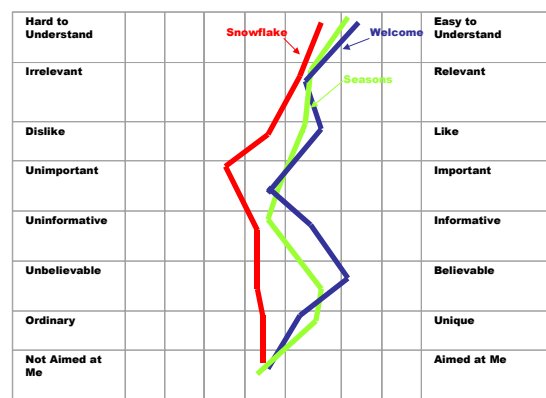
- **Discovery:** The opportunity to experience new and different sights, sounds, cultures, and experiences; to complement self-awareness, self-improvement, and self-actualization exercises
- **Recovery & Rejuvenation:** The opportunity to recharge batteries (mind, body, and soul) and reconnect with friends and loved ones
- **Escape:** The ability to remove themselves from the grind, stresses, and routines of everyday living

Based on the consistency of the responses from consumers, the creative execution of specific campaigns has attempted to associate the emotional benefits travelers desire from leisure and recreational activities with the tourism products and opportunities in Utah.

The Creative

In addition to gauging consumers' emotional motivations for travel, the focus group research also allowed current campaigns to be evaluated and future campaigns to be pre-tested within a strategically targeted group of consumers. Both print and television advertising have been pre-tested and evaluated. For example, three television concepts were tested for the post-Olympic fall/winter campaign. Based on the strong performance of two of the concepts, production continued with some minor adjustments based on consumer reaction. In each round of evaluation, UTC advertising has consistently performed well among the target group of consumers.

UTC Ad Concepts Spring 2002 Pre-Test



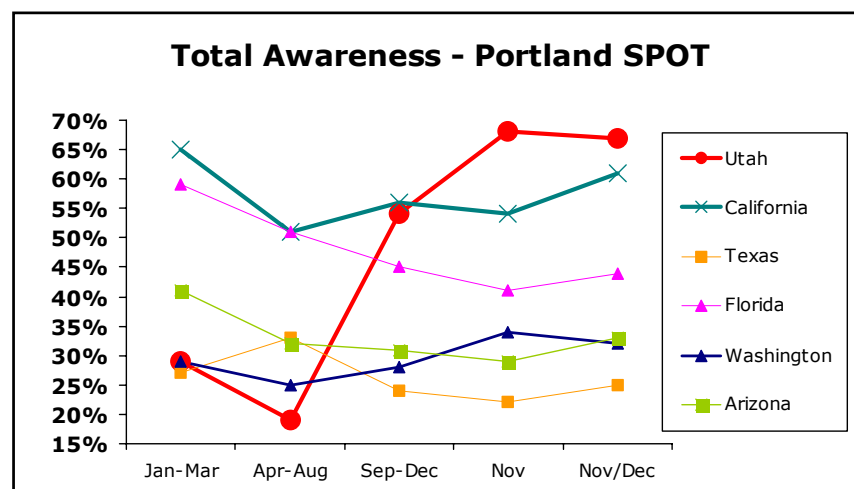
Based on the results of the series of focus group inquiries, the Division is confident about the message and creative execution of its campaigns. The Division continues to utilize pre-testing and focus group evaluations to ensure strategic consistency and emotional resonance among key consumer groups.

The Impact

The Division has engaged in a series of research initiatives intended to evaluate the effectiveness of its advertising efforts. Beginning in 2001 and continuing in 2002 and 2003, independent contractors were engaged to monitor and assess the impact of Division marketing efforts.

The **2001 Advertising Effectiveness Study** was the first effort of its kind in the state of Utah. Its objective was to identify shifts over time in key persuasion measurements such as awareness, consideration, desire to visit, and intent to visit. Conclusions from the research have helped develop and refine advertising strategies. Key findings from the 2001 study concluded:

- Division advertising was successful at raising awareness in all markets tested
- Spot market television advertising in Portland was particularly successful at raising all key persuasion measurements
- Based on the success of the Portland market advertising, Utah's competitive position was enhanced relative to competing destinations
- Contractor recommended that the state continue to utilize spot market television advertising and where possible, expand such advertising to other nearby feeder markets



Based on the successful results of the advertising effectiveness study conducted in 2001, the Division proposed an even more comprehensive evaluation of its marketing effectiveness through a project beginning in Fall 2002 and extending through Spring 2003. NFO Plog Research, a highly respected firm that has conducted similar studies for multiple states, was commissioned to do the **FY03 Utah Advertising Effectiveness Study**. The key objectives of this project build on the previous study:

- Measure the impact and effectiveness of the advertising campaigns by focusing on shifts over time in key persuasion measurements
- Measure the incremental travel that could be attributed to the advertising campaign
- Provide an estimated return on investment based on actual or influenced travel to Utah from advertising campaigns
- Track changes in attribute ratings, trip satisfaction, planning sources over time and compare results with competitive states

Key findings from the study concluded:

- About one in five travelers in 12 Western states has been to Utah in the past three years. They spend about \$589 per trip.
- Among residents in 11 Western states, Utah's image is similar to competitive states on most attributes, but is deficient on:
 - Beautiful / Scenic
 - Great Getaway
 - Lots to do
 - Dining / Entertainment
- However, if Utah can entice tourists to come, they like what they find. Among residents of 11 Western states, over 80% of Utah visitors were satisfied with their visit
- Two in five recall Utah's advertising, lowest among the competitive states. By market, results are: 53% in Los Angeles, 60% in Las Vegas, and 32% in Dallas.
- Correspondingly, Utah's advertising impact is the lowest among competitive states. Further promotion of Utah and development of a more accurate image is essential to not only attracting greater tourism, but even maintaining the current level.
- Why? Because advertising works. Meanwhile, competitive states constantly seek to "raise the bar" in competing for tourists' dollars. If Utah fails to increase the reach and frequency of advertising, it will lose ground to nearby competitive destinations.
- Fewer than one in five (17%) respondents expect (extremely/very likely) to visit Utah in the future. The ratio is higher among past visitors and slightly higher among those aware of the advertising.
- **Currently, using a very conservative estimate, the Utah Travel Council impacts over \$30 million of tax revenue, returning \$8.64 on each advertising dollar spent.**

The Research Director for the Utah Department of Community & Economic Development and the Institute for Outdoor Recreation and Tourism at Utah State both reviewed the study. Both parties agreed that NFO Plog's conclusion that the Utah Travel Council gets a return on investment of \$8.64 on each ad dollar spent and impacts over \$30 million of tax revenue is conservative. They also found NFO Plog's methodology to be reasonable and valid.

Along with the quantitative results of the FY 03 Utah Advertising Effectiveness Study, a qualitative study of focus groups was conducted by Riester-Robb, the advertising agency for the Utah Division of Travel Development. The objective of the **2003 Riester-Robb Qualitative Study** was:

- To determine the most appropriate message opportunity evolving the campaign from the post-Olympic afterglow into the next phase attracting additional visitors in the current social climate.

Consumer focus groups in Utah's three major feeder markets of Dallas, Phoenix, and Los Angeles were questioned. Key findings in the study include the following:

- Travelers seek a large assortment of activities while on vacation
 - Hiking, camping, fishing, golfing, scuba diving, snorkeling, skiing, snowboarding, trips to the beach, shopping, dining, and sightseeing
- Most claim to take vacations to relax and rejuvenate, but are really looking for activities to take their minds off of their everyday lives
- Study participants associated the following with Colorado:
 - Skiing, snow, mountains, beautiful scenery, Denver
 - High level of excitement
 - Linked Colorado to unlimited outdoor activities
 - More exciting than Utah
- Study participants associated the following with Utah:
 - Mormons, religion, Salt Lake
 - Low level of excitement
 - Considered Utah to be conservative
 - Limited nightlife available
 - Limited activities available
 - Described as desert-like, red-rocks
- Participants were also questioned about the 2002 Salt Lake Olympic Winter Games:
 - Majority of participants watched at least one event
 - Thought the games were well done
 - Olympics made people feel more positive about Utah
 - People are not necessarily motivated to visit Utah because the Games were held there
- Regarding advertising:
 - Almost all claimed to have seen tourism ads
 - Overall, a low awareness when it came to specific details of any ads
 - Very few recalled seeing ads for Utah

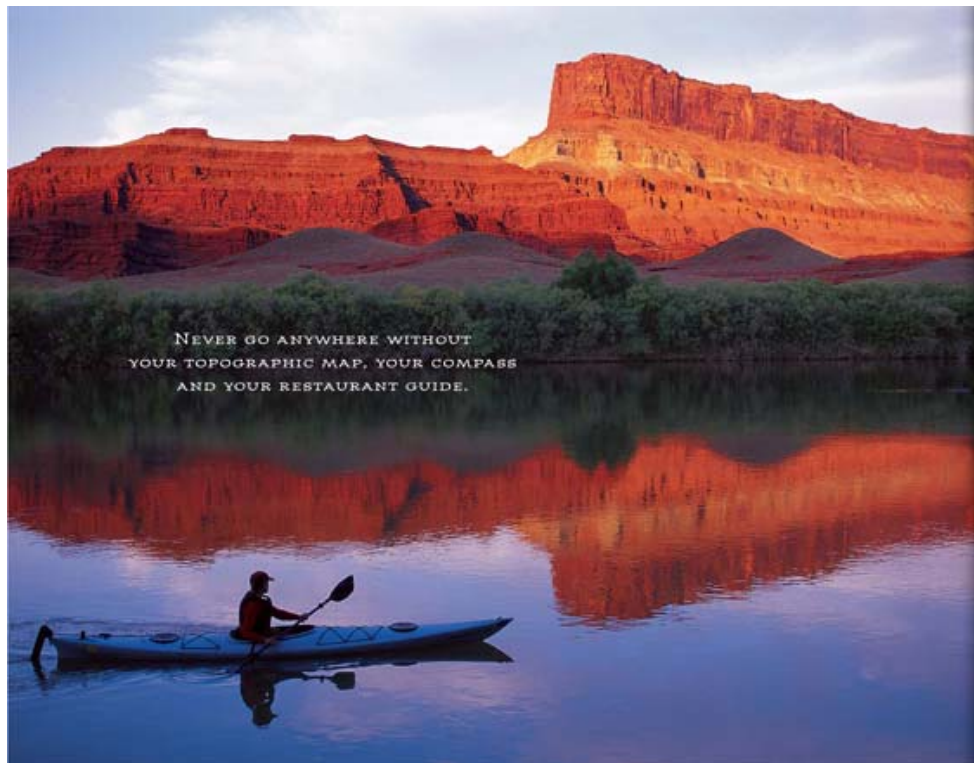
- Participants seemed to have a lack of awareness or knowledge:
 - Limited tourism marketing funds leave the audience to build their own perceptions
 - Through word of mouth
 - Through their own travel experience
 - Through the little knowledge they currently own
 - Through the advertising and communication efforts
- The Utah brand needs to portray a more desirable attitude to its audience:
 - It needs to reflect a brand world to which the majority of the audience would like to escape
 - Communication efforts need to share new, exciting, competitive and aspirational dimensions of a vacation experience in Utah
 - Utah's communications need to fill the knowledge gap of the audience

Riester-Robb and the Utah Division of Travel Development are working together to use the results of this qualitative study to refine Utah's message and make it even more effective in attracting visitors to Utah.

Conclusion based on the combination of these studies

A post-Olympic study in 2002 by Wirthlin Worldwide concluded that 7.1 million people are more likely to visit Utah as a result of the 2002 Olympic Winter Games. However, the qualitative study by Riester-Robb suggests that without somebody reminding them of what Utah has to offer, consumers seem to conjure pre-Olympic perceptions of the state. Once reminded of the Olympics and what they saw on television about Utah during that period, participants became more excited about Utah. The FY 2003 Utah Advertising Effectiveness Study concluded that Utah's ROI from advertising is \$8.64 and \$30 million in tax revenue. Advertising does generate additional revenue for the state and is necessary to build awareness and educate people on Utah's wonderful attributes. However, competitive states are increasing the amount of money they spend on advertising. Utah's ROI of \$8.64 for each ad dollar spent is a great investment, but without more funding to increase the reach and frequency of ads, Utah will continue to fall further behind other states.

The Utah Division of Travel Development remains committed to a research-based approach to advertising accountability. Through periodic focus group inquiries, the Division is able to test its messaging and creative work to maximize its impact among key consumer groups. In addition, independent surveys conducted on behalf of the Division monitor the actual impact of the campaigns among consumers. Together, they help develop advertising strategies that maximize Utah's effectiveness in the marketplace.



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AND YOUR RESTAURANT GUIDE.



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mountain rivers are laden with
excellent hotels, lodges and award-
winning restaurants. Surprised?
That's what a visit to Utah is all



about. You'll find one unexpected
pleasure after another, like gourmet
dining and therapeutic massage to
complement your day of hiking
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